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ABSTRACT

This strategic plan details the commitment of the California State Library to the future and the recognition of its record of achievement of the past. The document is divided into four sections. The first section discusses the Library's mission and philosophy and describes various programs (State Library Service Bureau, Braille and Talking Books Library, Automation Services, California Research Bureau, and Library Development Services) In addition, the State Librarian's comments are included. The second section describes the background, impact, opportunities and challenges, and key issues for five focus areas: (1) providing quality information services; (2) collecting, preserving, and promoting the State's resources; (3) providing counsel, support, and leadership for public libraries; (4) ensuring a productive work force; and (5) serving as a useful and respected cultural institution. The third section details the strategic plan (1995-2000) for each of the five focus areas. The final section defines strategic planning, including why it is valuable; outlines steps in the process; and discusses implementation and maintenance of the plan. In addition, the core planning group members are listed. (AEF)

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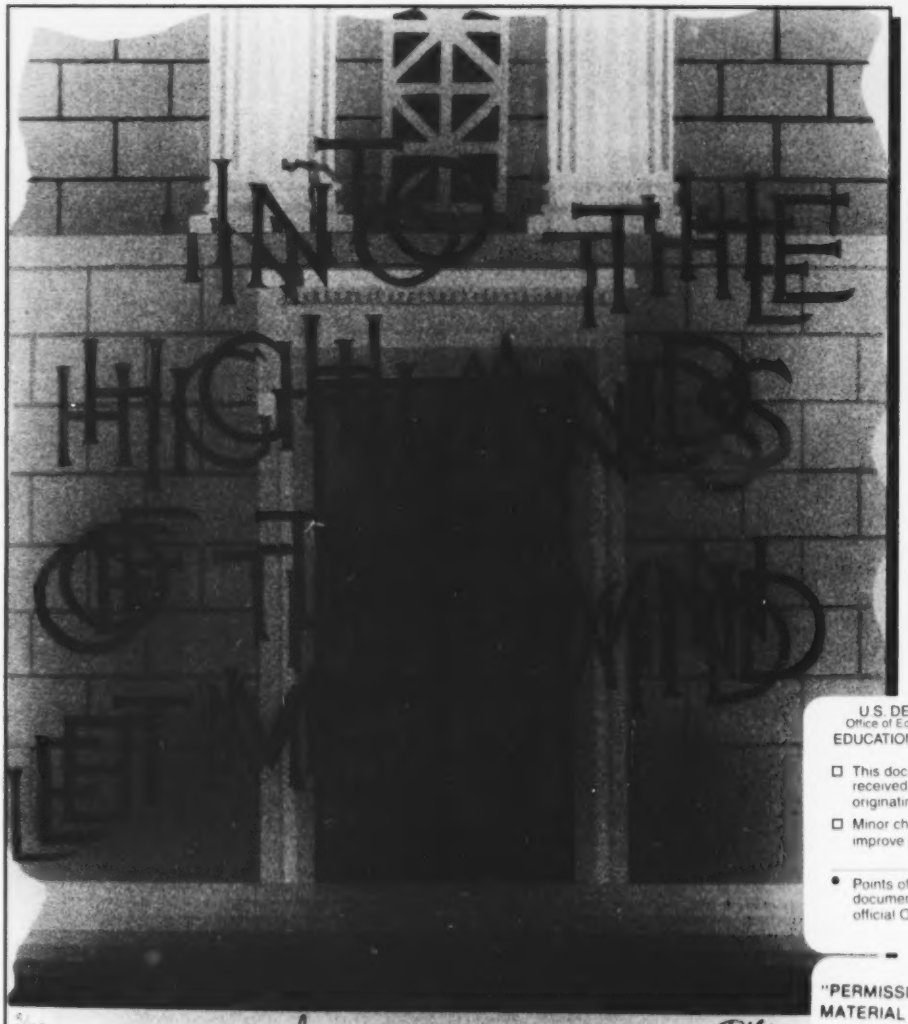

INTO THE HIGHLANDS OF THE MIND LET ME GO
California State Library, Sacramento
1850 - 2000 A.D.
150 Years

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Strategic Plan 1995 - 2000

California State Library
Sacramento, California

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Pete Wilson
Governor

Dr. Kevin Starr
State Librarian of California

Produced by the California State Library
April 1996

(Front Cover: Center panel, California State Library triptych by Joseph D'Ambrosio)

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Our Purpose — Our Challenge

The libraries of California represent a fundamental public good within our democracy. They provide access to information and knowledge, and are how we record our time, achievements and failures for future generations. They provide the capital necessary for us to understand the past and plan for the future. Free public library service is the basis of our democracy and will keep us a free nation. Democratic values depend on the free flow of information and knowledge with each individual assured the right and the privilege and the ability to choose and to pursue any direction of thought, study, and action. Libraries are also our collective memory, since history and human experience are best preserved in writing.

The California State Library believes deeply in equity and that libraries are fundamental in empowering people to take charge of their lives, their governments, and their communities. With the growing awareness of our diversity, libraries provide wonderful places for us to learn of the rich traditions and cultures that come together in our communities. The library collections we build, the access we provide, and the technologies we embrace will carry the people of California into a productive and creative future.

This strategic plan details the commitment of the State Library to the future and recognition of its fine record of achievement of the past. The staff of the California State Library is challenged to guide the Library through a process of change that will result in increased capacity even in light of the constraint of our current resources. The staff believes deeply in the future of California and that libraries have a significant and important role to play in that future.

Dr. Kevin Starr
State Librarian of California

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Our Charge

The California State Library is charged with performing the following activities as defined by law. The State Library, under the direction and control of the State Librarian, an appointee of the Governor, has responsibility:

- *To collect, preserve, generate and disseminate a wide array of information;*
- *To serve as the central reference and research library for state government and the Legislature;*
- *To advise, consult with, and provide technical assistance to and outreach programs for California's public libraries;*
- *To direct state and federal funds to support local public libraries and statewide library programs; and*
- *To develop automation systems to improve resource sharing and access to information.*

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Our Mission

THE STATE LIBRARY IS CALIFORNIA'S PUBLIC RESEARCH LIBRARY THAT HELPS A DIVERSE PEOPLE, THEIR GOVERNMENTS AND THEIR LIBRARIES MEET THEIR KNOWLEDGE AND INFORMATION NEEDS.

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Our Programs

The State Library Service Bureau (SLS) provides library services to a variety of library users, both directly and indirectly through other libraries. In order to perform its information functions, State Library Service gathers, catalogs, preserves and protects materials so they may be used easily. The interlibrary loan service supplements the collection of California libraries and assists local libraries by answering reference and informational questions. SLS also supports collections and services dealing with California history, government publications, law and state information and reference. In addition, SLS operates a branch, the Sutro Library, in San Francisco which includes many rare materials, as well as an extensive collection of family and local history.

Through the Braille and Talking Book Library, which is a regional library designated by the Library of Congress National Library Service for the Blind and Physically Handicapped, braille and recorded books (records and cassettes) and special playback equipment are provided to blind and physically disabled residents of northern California who are unable to use standard print materials. Funds are provided for the Braille Institute in Los Angeles to support the Southern California Regional Library.

The Automation Services program consists of library automation operations, including the integrated bibliographic system, the MELVYL system, microcomputer applications, specialized application of technology, data communications, and related support services.

The California Research Bureau (CRB) provides nonpartisan analytical research and specialized library services on major state issues for both houses of the Legislature, the Governor's Office and other constitutional officers. It maintains a growing publications program on state policy matters, including CRB Sheets that provide very current summaries of state issues, as well as more in-depth research works.

The Library Development Services (LDS) program provides state and federal financial assistance to libraries and provides technical consulting assistance to help local libraries extend and improve services to all residents. The primary components of the program are: (a) the California Library Services Act (CLSA), (b) the California Literacy Campaign (CLC),

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(c) the Families for Literacy Program, (d) the Public Library Finance Act, (e) the Library Services and Construction Act, and (f) the Library Construction and Renovation Bond Act.

The California Library Services Act helps public libraries and cooperative public library systems provide coordinated reference services and provides reimbursement for interlibrary loans of materials and loans to nonresident borrowers. The California Literacy Campaign provides community-centered literacy assistance to adults who have missed the opportunity to learn English. The Families for Literacy Program seeks to break the cycle of illiteracy by engaging the children of functionally illiterate adults in family-oriented activities designed to promote reading readiness and the joy of reading. The Public Library Finance Act is a funding formula under which the state may contribute funding for basic local library services under specified conditions. The federal Library Services and Construction Act (LSCA) provides grants to libraries for public library services, public library construction, and library networking and resource sharing.

In addition to the federal program, the California Library Construction and Renovation Bond Act was enacted through Proposition 85 in 1988 to provide $75 million in bond funds for construction and renovation of public libraries.

Librarian's Comments

The California State Library is a government agency with a specific mandate. Yet it is also something more. Founded in 1850, it is the oldest and most continuous ***cultural*** *agency in the State of California. Decades before there was a university system or a public library system, there was the California State Library. Through the 1850s, in fact, the California State Library can be considered an early and important locus of* ***cultural awareness*** *in California.*

THE CALIFORNIA CULTURE

Among other things, California is an important instance of American civilization. Like New England, like Virginia, like Illinois, California has played a determining role in the emergence of American civilization. This is to say, California is one of the regions in the United States which serves as a seed-bed for ideas, values, lifestyles, artistic creativity, all of which play a determining role in the evolution of American civilization in the 20th century.

When I speak about ***California culture*** *I mean American life as it is lived in this region, and as this region has shaped it. By* ***culture****, I mean the sum total of social, political, economic and artistic values that cohere in the matrix of California as a region and California as a mechanism of identity.*

The problem with California is that it is so vast, so large, so inclusive, that it is difficult to define precisely its cumulative civilization. Yet this cumulative identity is there. California has an identity which is known throughout the world.

OUR HISTORY

The California History collection in the California State Library represents the California State Library's effort to document and track the emergent identity of California as an important variation, indeed a representative instance, of American culture.

In the 1860s this awareness of the California State Library as the vehicle for cultural self awareness and promotion in California reached new intensity. In that decade the Library grew at an astonishing rate. Agents were commissioned on the East Coast and in Europe to purchase significant collections. It was at that point, for example, that the Audubon Double Elephant Folio was acquired by the State Library.

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OUR HISTORY

By the 1870s, the California State Library had emerged as the single most distinguished library in the state and the undisputed most important public institution of culture.

The collection development policy of the California State Library in the 19th century and the 20th century into the 1950s reflected the view that the California State Library, like the Library of Congress, had a comprehensive cultural view.

By the 1960s, the California State Library had lost its comprehensive role. First of all, the University of California and the California State University system sustained a vast and well-established library network. Secondly, great private libraries had risen throughout the state, most notably the Huntington Library in San Marino and the Stanford University in Palo Alto. Meanwhile, San Francisco and Los Angeles, together with other cities, were supporting an increasingly sophisticated public library system. In the 1960s the California State Library reverted to its first and primary mission: the information needs of government. However, its California collection at that point had achieved a level of comprehensiveness and distinction that kept the California State Library a cultural force.

Today, the California State Library exercises its most important statewide influence largely through its administration of California Library Services Act and federal Library Services and Construction Act funds.

OUR PURPOSE

It is time for the California State Library to reinvigorate itself and regain momentum in the area of ***cultural leadership****, especially in leadership pertaining to documenting ongoing questions of California value and identity. And it is time for the State Library to be universally recognized as the most dynamic state library in the nation for many reasons: the excellence of its collection; its philosophy and practice of efficient service to state government, its primary client, as well as to the libraries, library networks and the general public; its advocacy and support of appropriate technology; its effective statewide leadership in library development; and its care for the heritage of California and the continuing well-being of Californians. Most importantly — and supporting all these efforts — the California State Library will be known for the expertise and esprit de corps of its staff, committed to the highest ideals of library and information service.*

Our Vision

The California State Library will be the most dynamic state library in the nation and will be recognized as such.

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Our Philosophy

OUR PHILOSOPHY

A flourishing society requires information, cultural memory, and interpretation. The California State Library is uniquely positioned to serve each of these needs and strives to be ever-available as a resource to Californians as they seek to understand the past, cope with the present, and forge the future.

In order to meet the information needs of government, other libraries, and the people, our services to Californians must be proactive as well as reactive. Not only must we meet the immediately expressed needs of our customers, we must also anticipate where state government is going, ask the appropriate questions, formulate the correct policies, collect the correct materials, so that we might offer instant and applicable information service to state government and the public as required.

This implies that the individual staff members of the California State Library will themselves be intellectually engaged with the world around them; that they will have a sense of society, especially a sense of California; that they will reflect upon experience; that they will be readers and analyzers; that they find enjoyment in their jobs and see the intrinsic value of their work, especially how their particular job fits into the pattern of the whole; and that they will bring the fruits of their own intellectual engagement to bear on their professional responsibilities.

The manner in which we work towards our vision is as important as the vision itself. Our central values are key to achieving our vision for the future, and as such, we strive to integrate them into our daily service to state government, the state's libraries, the public, and to each other.

OUR VALUES

Information: *We believe that library and information service is essential to a learning society because information and knowledge are indispensable to the development of human potential, the advancement of civilization, and the continuance of enlightened self-government.*

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OUR VALUES

Services: *We believe our services are a reflection of our people. We will strive for continual improvement in all our activities and to deliver services that are of the highest quality which consistently satisfy our customers' needs.*

Partnerships: *We believe partnerships that are built on honesty and respect are critical for our success and strive actively to collaborate with all our partners in order to achieve mutual benefit for both ourselves and our partners.*

People: *We believe that the State Library is only as good as the people we employ and strive to treat our staff members with dignity and respect, encouraging participation, involvement and teamwork at all times and at all levels.*

OUR PRIORITIES

Customers: *We exist to serve our customers and meeting their needs is first and foremost.*

Quality: *We value the importance of providing rapid and comprehensive access to knowledge and information and strive to constantly improve the services we provide to state government, the public and to each other.*

Technology: *We believe libraries must be active partners in the development and implementation of technology to ensure that access to knowledge and information will be equitably available to all.*

Continuous Improvement: *We believe that continuous improvement should embrace every aspect of our work and encourage our employees to look for and find ways to contribute to our development. Our employees' creativity, productivity and individual responsibility is encouraged and employees will be recognized and rewarded for their contributions.*

A Closer Look

The summaries that follow provide background information on each of the State Library's five major strategic focus areas.

These summaries describe the key issues facing the Library, as well as some of the opportunities and challenges that were considered during the development of specific strategies to address them.

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Provide Quality Information Services

BACKGROUND

California's economy suffered through a severe recession in the early 1990s, driven by severe cutbacks in defense, a major national recession, and major decline in the state's home-building industry. Many state agencies, including the State Library, adjusted to declining budgets during this period.

Although its recovery lagged behind the nation's, California's economy is now accelerating. Its fastest growing economic sectors are business services and professions, motion pictures, construction, wholesale trade, and electronics manufacturing. California job growth is expected to outpace the nation's for each of the next three years.

IMPACT

The State Library must function within a state with an economy undergoing a substantial change in structure. Military and defense employment, which fueled the state's economic growth during the 1980s, are unlikely to play that role again anytime soon. Future high wage job growth is most likely to come from high technology, information, biotechnology, entertainment, and services. The economy will become increasingly international in its outlook. As these comparatively sophisticated industries grow in relative importance, and as state government attempts to support their growth, the volume and complexity of the information needs of the state's government will also increase. In addition, the knowledge, skill, and literacy and numeracy requirements of California's working population are likely to increase rapidly. The State Library, and other public libraries throughout the state, must face the challenges presented by these changes and adapt to the information needs they bring.

OPPORTUNITIES AND CHALLENGES

Within its existing statutory duty to provide research and information to the Legislature and state government, the State Library has become a major source of policy-related information and analysis with the addition of its California Research Bureau. The Research Bureau carries out its function in a strictly nonpartisan manner, and the cornerstone of its credibility is its impartiality and resistance to taking positions on political issues.

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OPPORTUNITIES AND CHALLENGES

In addition, the State Library is in a fortunate position to take advantage of technology ventures on the national, state and local levels. These include the evolving definition of a national information infrastructure, the increasing interdependence and co-developments taking place among communications companies and media organizations, and the availability of federal dollars for technological development. An increasing number of libraries are connected to or have access to the Internet. Libraries are also exploring technology options with local communication services vendors in an effort to better support their clientele. In state government, agencies are being encouraged to explore (multi) cross-agency options for sharing data and other technology resources where feasible.

The State Library is beginning what may be an epochal change in the role of libraries in the electronic age. At the most modest level, computers allow ordinary library functions to be carried out with increased efficiency. For example, the library's catalog is electronic and quickly searchable. In addition, catalogs of other libraries throughout California and throughout the world can be searched. The Library is improving its collection of information available on CD-ROMs and in other electronic formats for patron use.

The Library also has a key role in making state information electronically available to the public. For example, the State Library recently developed the California Home Page on the World Wide Web, a web site that conveniently indexes all state government information available on the Internet (and which is widely regarded as the best state government home page in the nation). The Library also developed CEDAR, a web site which provides access to information about military base closures, reuse activities, and defense industry conversion issues relevant to California. It is plausible to expect that these kinds of Internet connections will become the primary way that Californians get publications and other information from their state (as well as local and national) governments. It is likely that the recently passed federal telecommunications law will increase the speed and versatility of this communication channel.

Inhibitors to libraries' (including the State Library) ability to fully embrace new and emerging technology include: insufficient start-up and continued funding for information technology and telecommunications applications, hardware, and support services; geographical disparity in

Focus — Provide Quality Information Services

OPPORTUNITIES AND CHALLENGES

access to information services and systems; and libraries not being in a position of leadership to drive development efforts.

The State Library is concerned that the rapid spread of the direct use of networks such as the Internet by people in their homes and offices will mislead people into thinking that they now have all the information they need at their fingertips and that there is no longer a need for libraries. In a similar vein, private, for-profit information providers and other state agencies entering into the information provision business may cause current and potential library users to forget about the resources available to them through libraries. The State Library worries about its future role and the potential that people will not get all the information that they need, since reduced staffing has resulted in the library being open for service fewer hours.

KEY ISSUES

- ***A dynamic economic, political and technological environment demands that we stay in touch with and position ourselves to respond to the rapidly changing information needs of both state government and the public.***

- ***Rapidly changing technology, coupled with increasing costs and continuing competition for scarce public and private resources, requires that we optimize existing inter-agency, community, and library partnerships and actively pursue new partnerships in order to maximize our investments in technology and to develop and achieve our shared objectives.***

Provide Quality Information Services

We intend to move further in the direction of a library driven by customer demand and the customer's need to cope with information overload. Such a change is necessary to provide quality information services to those in state government who may not have enough time to know what information is available, let alone learn how to obtain it. In all its efforts, the State Library will assist the people of California in gaining electronic access to the information resources of state government.

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Focus

Collect, Preserve and Promote the State's Resources

BACKGROUND

In January 1850, explorer, soldier, and politician John C. Fremont donated a trunk, filled with law books and legal materials, to the newly formed civilian government. The gift became the first items in the State Library's collections. These collections document the history and growth of the state, encompass a record of both state and federal government business, gather important economic and scientific information, and support the formation of public policy. Today the collections of the State Library encompass some seven million items in a variety of formats. Balanced with a need to preserve and protect these vast and extensive resources, is the need to respond to the privatization and commercialization of information, which has greatly increased -- not only by the quantity of new knowledge and information, but by the increased funding required to keep pace.

The Library's collection of U.S. and California government publications is the most extensive in the West. It is the only regional complete depository of U.S.publications in California and the most complete collection of California document material. The Library's collection of scientific, technical, trademark, and patent information is critical to the economic health of the state.

As the collections have grown, many items are not appropriately housed and the lack of environmental controls lead to repeated mold outbreaks threatening the existence of some of the Library's collections. Many items have also begun to deteriorate as paper-life is surpassed. Lack of a sprinkler system in the main stack tower also exposes the collection to permanent loss in the event of a fire. While it is important in some cases to preserve the original artifact, new preservation methods are available to allow the Library to greatly enhance the life of much of its resource. The challenge to preserve the intellectual and historical record is balanced with the need to acquire new knowledge and to keep pace with the expansion of new sources and kinds of information that are needed by the state's government and its diverse people.

The State Library's materials acquisitions budget has been severely reduced over the past five years, requiring a careful examination of its collection development strategies to ensure that it can continue to meet its mission into the future.

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Focus

Collect, Preserve and Promote the State's Resources

IMPACT

Further deterioration of the record held by the Library will deprive future generations of the full knowledge to be gained from this vast collection of material. As local library budgets are hard pressed to acquire a broad range of materials, the role as a resource library is ever more critical. The state needs to remain highly competitive in the economic marketplace, and information is a key commodity to support that competitiveness. By preserving the Library's existing collections and expanding the Library's collection development scope in the future, the state can ensure a level playing field for a diverse people to access the knowledge and information they need to be productive participants in the future economic growth of the state. Changes in copyright and freedom of information laws may have further impact on the availability of information. The Library's role in serving as the only regional depository for federal government information in California and a complete depository for California government information must be protected. The State Library and other libraries throughout California are challenged by changes in technology, the privatization of information, and the reduction of funding available to acquire a reasonably comprehensive portion of the new knowledge being generated. The federal government is also pushing to create all federal information in machine-readable form immediately, placing an unfunded burden on depository libraries to provide the hardware, software and personnel required to deliver needed information to users.

OPPORTUNITIES AND CHALLENGES

The State Library is well positioned to continue its collection development function, building on its vast and extensive collections. During the past several years the Library has been converting its manual bibliographic retrieval systems to a computer-based catalog in cooperation with many other libraries. Joining together, the libraries of California have developed access to the vast holdings of the state's libraries. Much of this effort has been supported by the State Library and access to the State Library's resources are readily available throughout the state and nation. We have the opportunity to expand our collaboration with other organizations and state entities to assure that these resources are even more readily accessible. As improved technology becomes more widely available and cheaper, the potential for these collaborative ventures is greatly enhanced.

As mentioned, the State Library has begun to participate in multi-agency projects or partnerships with other agencies, as well as public/private partnerships which can expand the collections and information available

OPPORTUNITIES AND CHALLENGES

to all of the state's people and to government decision-makers. These relationships can help the State Library redefine its collection development role. Linkage to the Internet and other national telecommunications structures, partnerships with communications companies and other service providers, and the joint preservation of scarce and valuable resources are examples of this potential. The State Library has managed the development of the State's Home Page on the Internet.

One of the most significant inhibitors to the Library's ability to fully realize its potential is the continued erosion of its funding base.

As individuals and library users embrace technology tools, many see online systems as the complete solution to their information needs, resulting perhaps in lowered use of "traditional" library services or bypassing the library entirely. In addition, the increasing availability and use of electronic information raises issues of copyright and intellectual property ownership, particularly with respect to materials used on the Internet. And, the existence of disparate standards for technology-based products and services makes interoperability and information interchange problematic. There is also increased pressure to convert to all "digital libraries" without adequate equipment and personnel resources to follow this direction.

The State Library is concerned that this rapid spread of the direct use of networks, such as the Internet by people in their homes and offices, will mislead people into thinking that they now have all the information they need at their fingertips and that there is no longer a need for materials available through libraries. Because of budget cuts, dwindling staff have a hard time keeping up with the demands for resources and information on a daily basis, as well as the ability to process newly acquired material in a timely manner so it can be readily accessed when needed. At the local level, libraries are hard pressed to acquire the books and other materials that are requested by their customers to meet their own needs.

Focus

Collect, Preserve and Promote the State's Resources

KEY ISSUES

- ***The movement toward production of data and information in non-print formats, as well as the increased pressure to privatize and commercialize information requires that we reassess our collection development strategies.***
- ***In order to ensure the State Library's extensive and vast collections are preserved, we must maximize existing preservation and conservation facilities and pursue alternative means of preservation.***
- ***In order to ensure maximum utilization of the State Library's collections, we must provide comprehensive and convenient access to the collections for library patrons statewide.***
- ***In order to ensure efficient and effective access to the State Library's extensive and vast collections, we must complete the implementation of automated collection control.***

Strategy

Collect, Preserve and Promote the State's Resources

We intend to take a more aggressive role in collecting, preserving and/or promoting connections to information and cultural resources reflecting the state's diversity, institutional and governmental structure, and economic restructuring.

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Focus

Provide Counsel, Support and Leadership for Public Libraries

BACKGROUND

Facilitating the public's access to information on the broad range of issues affecting life in the community remains at the core of the public library's mission.

California's population is undergoing a major and long-term diversification in ethnic and racial makeup, cultural diversity and background, and age and economic status. Within a single generation, California has become the country's most diverse and complex society.

Social and cultural forces emerging at the national, state and local levels which affect the State Library's operating environment include the increased focus on health care including the continuing need to provide information about the spread and prevention of AIDs and other health-related issues; the increase of gangs and gang-related activity and crime; the increasing number of children and youth in poverty and at-risk; the growing concern about the availability of guns and the effects of violence in society; and, the responsibility to bring public facilities and services into compliance with the Americans with Disabilities Act.

At the same time, the State Library and the library community must operate in a climate of downsizing, likely to be reflected in further budget reductions and cutbacks and the continued anti-tax, anti-government expressions of voters. The free availability of government information continues to be threatened.

IMPACT

Localities rallying for "essential" public safety services, and state limitations on the ability of local jurisdictions to fund services and raise local revenues, have adversely affected funding for public libraries. California's lack of school library facilities and funding also has an impact on public libraries.

OPPORTUNITIES AND CHALLENGES

The State Library and the library community can play a leadership role in helping communities to redefine library services so that access to information critical to society's well-being and development will continue to be available to all in the community.

Current and historical initiatives on the federal, state and local levels which affect the Library's operating environment include the 1996 reauthorization of the federal Library Services and Construction Act (LSCA), the Elementary and Secondary Education Act (ESEA) programs,

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Provide Counsel, Support and Leadership for Public Libraries

OPPORTUNITIES AND CHALLENGES

and the potential for libraries to benefit from a strong involvement in the definition of the national information infrastructure. Also, libraries are being encouraged to provide specialized resources for special information needs, as well as mainstream library service for people who are disabled. Legislative term limits are likely to have an impact on the fortunes of libraries in the state.

These changes offer the State Library unparalleled opportunities to redesign library services to more readily meet the needs of California's diverse communities. The state's growing interest in improving the living conditions for children, youth and their families will allow libraries to continue their primary role of enabling children to become skilled information and library users at an early age.

In responding to the state's diversification in ethnic and racial makeup, the State Library faces the challenges of helping libraries to assess their collections, services and staff to reflect the needs of their changing communities and to respond appropriately; and, of promoting the library as a community gathering place to discuss issues and eliminate barriers to working together as a community.

The current planning effort led by the California Library Networking Task Force provides public libraries with a unique opportunity to expand their collaborative efforts with libraries of all types. The establishment of a statewide multitype library network will enable libraries of all types to share resources, provide increased access to information in all formats, and develop coordinated services.

At the local level, the State Library's declining ability to provide adequate local assistance funds may alienate local library allies and clients who benefit from the programs supported by those funds. The State Library and the library community are also concerned about: (1) the reductions in charitable contributions and their impact on discretionary funding for libraries; (2) the effects of professional and technical expertise leaving the state due to the economic downturn; (3) the change in taxpayers' attitudes regarding support for education; and (4), the challenges in responding positively to living in a culturally diverse community.

Focus

Provide Counsel, Support and Leadership for Public Libraries

KEY ISSUES

- ***In order to ensure that responsive library service is available to the people of the state, we must facilitate its successful evolution at the local level.***

- ***The fact that the education of librarians is at a crisis in California and no university in the state is currently mounting a major effort to train public librarians, means that we must assume a leadership role in ensuring that professional library education is available in California.***

Strategy

Provide Counsel, Support and Leadership for Public Libraries

We intend to counsel, support and lead public libraries throughout California so that they might more effectively support their current users and meet the needs of the state's culturally diverse communities.

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Focus

Ensure a Productive Work Force

BACKGROUND

As a small agency, the State Library has the full range of agency responsibilities, requiring that many diverse functions be performed by a small staff.

Although the general economic condition of the state has fostered an overall movement toward work force downsizing, thus resulting in additional skilled workers being available for employment at lower wage levels, hiring restrictions imposed by the state inhibit the State Library from tapping into this enhanced worker pool.

The current operating environment of the State Library is affected by efforts at the federal, state and local levels to re-think the roles and organizational structures of government. The Library has been successful in seeking out and obtaining financial resources to support new programs and services in this climate, and anticipates that additional opportunities can be developed.

IMPACT

The probability of continued pressure on baseline budgets, coupled with the current rigid state budget structure, presents difficulties in the Library's ability to obtain the necessary equipment to implement current and emerging technologies, as well as to replace worn-out or obsolete equipment. State procedures and controls for obtaining, utilizing, and replacing physical resources make it difficult to maximize the effectiveness of constrained financial resources.

Accompanying the trend to restructure government is the economic and political necessity to reduce governmental costs, which threatens the Library's ability to maintain current levels of service in established programs.

The inability to fill vacant positions due to salary savings requirements and hiring restrictions causes morale problems by creating increased workloads for existing staff.

OPPORTUNITIES AND CHALLENGES

A major strength of the State Library is its staff of individuals dedicated to the Library and to providing its services, which, considering increasing demands and constraints, demands optimum performance of their duties. Included in these strengths are staff who have high personal performance standards, and many who are long-term dedicated employees of the Library.

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Focus — *Ensure a Productive Work Force*

OPPORTUNITIES AND CHALLENGES

The staff is highly diversified, with many experts and high achievers. Staff members are flexible and willing to assume new and/or added responsibilities.

Although upper management has a good sense of the overall direction of the agency, communications with mid-level managers and rank-and-file staff are limited and tend to be one-way (downward). To some extent, employees are dependent on an informal communication trail, which at times provides inaccurate or incomplete information. Utilizing the State Library's management staff more effectively is an area for concentration.

The compartmentalization of the Library into separate Bureaus with focused operating and work environments creates the possibility for conflict between those entities, inhibits information-sharing, and hampers the ability of some staff to identify with the Library's overall mission and to understand and accept the inevitable changes that must be made in order to fulfill the Library's mission under current constraints. These same factors may adversely affect morale and inhibit the development of a collaborative spirit and enthusiasm among staff members for the Library and its mission, and for one another.

Identified areas in need of a concentrated effort to strengthen and/or improve the State Library's operating environment are: first, increased emphasis on the part of management and staff on individual training and (job) cross-training; second, individual-to-job matches and very thin staffing patterns should be reassessed in order to achieve the best possible combination of individual capabilities and State Library priorities; and third, manager-staff communications concerning job performance standards, expectations and achievements need improvement, and would benefit from implementation of a more regularized performance appraisal process.

Also, although the Library enjoys a centralized approach to developing and managing its internal policies and the ongoing changes being imposed by control agencies, there is not sufficient formal training and/or introduction to its policies and procedures.

Focus — *Ensure a Productive Work Force*

The physical resources available to carry out the Library's mission were enhanced when the Library moved into the new Library and Courts II building. Significant upgrades in existing equipment, particularly in communications and information technology, offer opportunities for service improvement. The older Library and Courts building will require substantial investment in future years to address deferred maintenance and technology upgrade needs.

KEY ISSUES

- ***In order to foster a collaborative spirit among staff, enhance morale and increase productivity, we must re-evaluate and implement changes to our internal processes and communications mechanisms.***
- ***To meet the demands of a rapidly changing environment, the Library should remain flexible and efficient in its services, programs and priorities.***
- ***Challenges in meeting increasing demands with limited or shrinking staff require that we improve intra-agency cooperation and communication and implement an integrated, agency-wide approach to achieving objectives.***

Ensure a Productive Work Force

We intend to implement systems and create a work environment that will allow for the maximum productivity, efficiency, safety and well-being of staff.

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Focus

Serve as a Useful and Respected Cultural Institution

BACKGROUND

A society sustains itself over time through memory. No agency or institution serves memory more directly than the library. Founded in 1850, the California State Library embodies the consciousness of American California as it has been developing these past 150 years. California's development has contained within itself a search for identity. What is California as a region, a society, a culture, a commonwealth? What are the distinct values and goals which have shaped the emergence of American civilization in this place called California? The answer to that question is the record itself, and the California State Library preserves the record. In its California collection especially, but in its other collections as well, the California State Library seeks to preserve, cherish, order, arrange and share the rich record of human aspiration and achievement, human error and folly, in this uniquely American phenomenon that is California.

IMPACT

As a library and information agency, the California State Library serves the information needs of the libraries of California and its government. As a cultural institution, however, the California State Library is more than a service agency. It both reflects and advances the past, present and future of the state. The California State Library has as its energizing mission not only the service of information needs, but a leadership role in how those needs are formed. Like a great university, college, museum, or research hospital, libraries embody the consciousness of their era. Libraries also stimulate the development of analysis and reflection upon the past, present and future. In serving this process of cultural memory, retrieval and use, the California State Library finds itself at the cutting-edge of governmental, academic and educational life in the state.

The California State Library is considered an important locus for ***California value and social identity****. It serves as one of the state's predominant knowledge centers, assisting Californians in their self-discovery through the selection and patterning of knowledge and information.*

OPPORTUNITIES AND CHALLENGES

Throughout the world there are a number of great libraries. In the United States, the ranks of great libraries include university libraries (Harvard, Columbia, U.C. Berkeley), some public libraries (New York, Chicago, Los Angeles), a number of independent libraries (the Huntington, the Newberry, the Folger), and the Library of Congress.

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Focus

Serve as a Useful and Respected Cultural Institution

OPPORTUNITIES AND CHALLENGES

The State of California should show its greatness, its passion for excellence, in every phase of its institutional life — including its state library.

California, one of the world's top producers of goods and services, enjoys a worldwide reputation as being more than just a state. It is a state of mind as well as a place and is possessed of its own special identity.

From this perspective, the California State Library should seek to establish creative connections with the leading state libraries of the United States (New York, Illinois, Texas, and other populous states) and to the national libraries of Europe, Africa, the Americas and Asia. The international connection is doubly important in that no nation in the world is without a population in California. California, in other words, is by its very definition international in scope, and so should be its state library.

The California State Library is challenged in many ways to meet its vision of serving as the locus for California value and social identity. If it is to do so, it must resume a comprehensive collection development policy. This means that the California State Library should once again collect ambitiously in all areas of relevance to California on an interdisciplinary basis — striving to ensure that its collections embrace all titles relevant to the past, present, and future of California. It should produce a selective bibliography covering the entire history of California for publication by a major press. This bibliography would not merely list every entry relating to California, but would rather select, arrange, and annotate the most significant materials — documents, monographs, pamphlets, and other related materials — documenting the emergence of American civilization in California.

The California State Library should establish itself as the locus and host agency for the California Sesquicentennial because by doing so, it will reestablish the importance of the California State Library as an agency of cultural development in the state. The Sesquicentennial will direct and channel significant cultural forces and personalities to the California State Library and therefore will reinvigorate the Library as something more than a routine government agency.

The California State Library should host symposia and support programs dealing with significant studies of art, culture, and social experience in

OPPORTUNITIES AND CHALLENGES

California. Topics for such symposia should include such topics as the characteristics of art and architecture in California, the California tradition of economic and social thought, the history of the environment, various aspects of the multicultural history of the state, the role of women on the California frontier, California as a matrix for technological development, religious experience in California, political phases and traditions, the entertainment industry, and history and role of higher education.

The California State Library should seek to share the richness of its collections with every Californian and should take steps to ensure that every segment of California's population has access to the vast resources of the state contained in its libraries. This includes communicating to the people of California its unequivocal commitment and leadership in all matters relating to the reading and information needs of the blind, visually handicapped and the print impaired of the state.

The State Library's strategic plan, to include the vision statement, contains a program of development which would transform the California State Library into a dynamic institution on a par with comparable libraries and other academic institutions in the world. An important facet of the plan is that it recognizes and addresses the ongoing need to preserve and promote professional librarianship. The education of librarians is at a crisis in California. With the exception of San Jose State University, and to a lesser extent UCLA, no university in California is currently mounting a major effort to train public librarians. The time has come to return library education to major libraries, as it was in the early part of the century. This time, however, there will be a library/university partnership. As its ongoing commitment, the California State Library will assume a leadership role in professional library education in California.

Focus

Serve as a Useful and Respected Cultural Institution

KEY ISSUES

- ***Because California's culture is undergoing unprecedented change and challenge, the Library should both preserve California's cultural base and document and popularize its cultural heritage.***
- ***The unique needs of the blind, visually handicapped and the print impaired community requires statewide leadership relating to their reading and information.***
- ***Because California is the most international community on the planet, we must ensure that we maintain a diversity of both national and international connections, and serve as a reflection of the cumulative culture of the state.***

Strategy

Serve as a Useful and Respected Cultural Institution

We intend to position the California State Library in fact and in reputation as a significant cultural institution in California and the nation.

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The Plan Details

California State Library

Strategic Plan 1995-2000

Strategy I — Provide Quality Information Services

We intend to move further in the direction of a library driven by customer demand and the customer's need to cope with information overload. Such a change is necessary to provide quality information services to those in state government who may not have enough time to know what information is available, let alone learn how to obtain it. In all its efforts, the State Library will assist the people of California in gaining electronic access to the information resources of state government.

(California State Capitol, 1995)

STRATEGY 1.1 REASSESS AND REALIGN LIBRARY SERVICES

ISSUE

A dynamic economic, political and technological environment demands that we stay in touch with and position ourselves to respond to the rapidly changing information needs of both state government and the public.

GOALS

- Reassess customer needs for timeliness, convenience, and delivery methods for information services.
- Realign library services as suggested by changing needs of customers.

STRATEGY 1.2 MAXIMIZE TECHNOLOGY PARTNERSHIPS

ISSUE

Rapidly changing technology, coupled with increasing costs and continuing competition for scarce public and private resources, requires that we optimize existing inter-agency, community, and library partnerships and actively pursue new partnerships in order to maximize our investments in technology and to develop and achieve our shared objectives.

GOALS

- Help make state and local agency information available on the Internet.
- Promote effective public and state agency use of the resources of the Internet by working with libraries and agency partners to identify and/or develop training and navigational tools.

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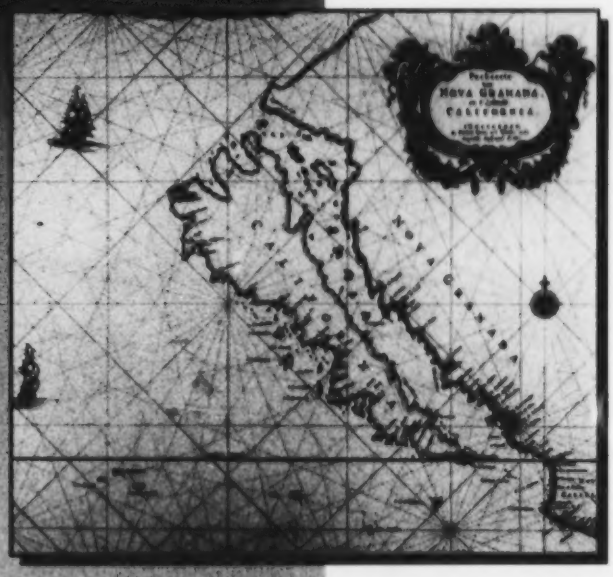
Strategy I *Provide Quality Information Services*

GOALS

- Develop strategic partnerships to ensure that public libraries are included at the policy level in the evolving national information infrastructure.
- Continue to provide leadership and support for the InFoPeople (public library Internet access) initiative.

Collect, Preserve and Promote the State's Resources



(Rendering of California as an island, 1665)

We intend to take a more aggressive role in collecting, preserving and/or promoting connections to information and cultural resources reflecting the state's diversity, institutional and governmental structure, and economic restructuring.

STRATEGY 2.1 *REASSESS COLLECTION DEVELOPMENT STRATEGIES*

ISSUE

The movement toward production of data and information in non-print formats, as well as the increased pressure to privatize and commercialize information requires that we reassess our collection development strategies.

GOALS

- Establish a cohesive strategy relating to the State Library's role in the preservation and building of its collection.
- Establish a collection development policy, backed by an adequate library materials budget, that fosters growth in areas identified during customer needs assessment.
- Develop alternative collection strategies for access to commercially available non-state government electronic information and services through the State Library.

STRATEGY 2.2 *PRESERVE AND CONSERVE THE COLLECTIONS*

ISSUE

In order to ensure the State Library's extensive and vast collections are preserved, we must maximize existing preservation and conservation facilities and pursue alternative means of preservation.

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Strategy II — Collect, Preserve and Promote the State's Resources

GOALS

- Preserve resources electronically.
- Enhance opportunities provided by existing facilities.
- Update the Disaster Recovery Plan for the collection.

STRATEGY 2.3 IMPROVE ACCESS TO THE COLLECTIONS

ISSUE

In order to ensure maximum utilization of the State Library's collections, we must provide comprehensive and convenient access to the collections for library patrons statewide.

GOALS

- Enhance the library's integrated bibliographic system in order to maximize use of integrated system access tools.
- Research and prepare comprehensive and persuasive BCP's so as to ensure restoration of full service hours for all facilities.

STRATEGY 2.4 MANAGE THE COLLECTIONS

ISSUE

In order to ensure efficient and effective access to the State Library's extensive and vast collections, we must complete the implementation of automated collection control.

GOALS

- Complete implementation of automated collection control.
- Ensure adequate resources to catalog, classify, process, maintain, and use materials acquired in whatever format (print, photos, film, electronic, etc.).

Provide Counsel, Support and Leadership for Public Libraries

We intend to counsel, support and lead public libraries throughout California so that they might more effectively support their current users and meet the needs of the state's culturally diverse communities.

(1994, Chinatown Branch Library, Los Angeles Public Library)

STRATEGY 3.1 *FACILITATE DEVELOPMENT OF PUBLIC LIBRARY SERVICE*

ISSUE

In order to ensure that responsive library service is available to the people of the state, we must facilitate its successful evolution at the local level.

GOALS

- On an ongoing basis, work to integrate effective governance, financing and delivery of public library services into the overall efforts to restructure state and local government.
- Assist the public libraries in California in their ongoing efforts to secure sufficient and stable financial support.
- Stimulate and develop innovative and effective programs that will effectively serve local communities.
- Develop strategic partnerships to ensure that public libraries are included at the policy level in the evolving national information infrastructure.
- Develop strategies that will promote the use of information services available through enhanced technology.

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Strategy III — Provide Counsel, Support and Leadership for Public Libraries

STRATEGY 3.2 — PROMOTE LIBRARY EDUCATION

ISSUE

The fact that the education of librarians is at a crisis in California and no university in the state is currently mounting a major effort to train public librarians, means that we must assume a leadership role in ensuring that professional library education is available in California.

GOALS

- Promote the establishment of an accredited master's program in library and information science to serve regions currently deprived of such education.
- Advocate and promote education for librarianship at all levels in every sector of the community.

Ensure a Productive Work Force

We intend to implement systems and create a work environment that will allow for the maximum productivity, efficiency, safety and well-being of staff.

(1919, Library school at the State Library)

STRATEGY 4.1 *EXAMINE THE STAFF-AGENCY RELATIONSHIP*

ISSUE

In order to foster a collaborative spirit among staff, enhance morale and increase productivity, we must re-evaluate and implement changes to our internal processes and communications mechanisms.

GOALS

- Improve internal communications by building and monitoring an environment that supports and encourages communication.
- Monitor and support internal communication media.
- Improve information flow throughout the organization.
- Enhance staff members' ability to relate to CSL as an organization.
- Clarify employee roles and expectations.

STRATEGY 4.2 *WORK PROCESSES*

ISSUE

To meet the demands of a rapidly changing environment, the Library should remain flexible and efficient in its services, programs and priorities.

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Strategy IV *Ensure a Productive Work Force*

GOALS

- Develop both external and internal customer focus.
- Create clear, concise and functional procedures that reduce rework.
- Establish ongoing process to determine and evaluate statistical information needed by the agency to monitor and improve its processes.
- Examine budgeting and accounting processes to improve timelines and comprehensiveness.
- Work with control agencies to ensure flexibility in reshaping organizational structure to meet unique and specialized mission.
- Encourage resource-sharing, cooperative projects and teamwork.
- Foster a management structure that promotes individual achievement and accountability and positive labor-management relationships.
- Develop and implement strategies which encourage responsible decision-making at the most direct possible level of service delivery.
- Explore alternative work schedules and options, including telecommuting.
- Encourage a safe and healthy work environment.

STRATEGY 4.3 *PLANNING & RESOURCES*

ISSUE

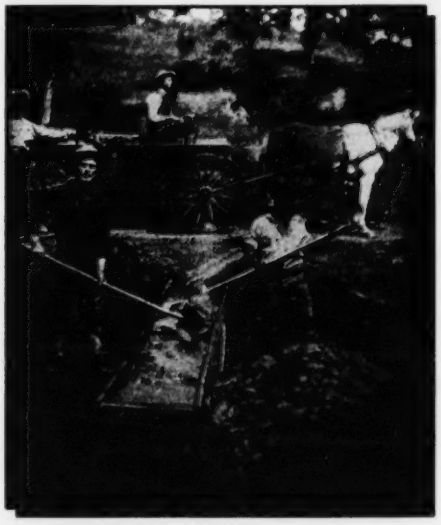
Challenges in meeting increasing demands with limited or shrinking staff require that we improve intra-agency cooperation and communication and implement an integrated, agency-wide approach to achieving objectives.

GOALS

- Bring in additional resources through volunteer programs, internships, student training and joint projects, recognizing workload impacts.
- Take a proactive approach with vendors, control agencies, and contractors to meeting CSL service requirements.
- Adapt facilities to meet changing needs and legal requirements.
- Examine agency-wide electronic infrastructure, including LCI and LCII building opportunities and constraints, and develop options for long-term communications and connectivity.

Serve as a Useful and Respected Cultural Institution

We intend to position the California State Library in fact and in reputation as a significant cultural institution in California and the nation.



(Looking for gold, Spanish Flat, 1852)

STRATEGY 5.1 *PROMOTE CULTURAL AWARENESS*

ISSUE

Because California's culture is undergoing unprecedented change and challenge, the Library should both preserve California's cultural base and document and popularize its cultural heritage.

GOALS

- To position the California State Library in fact and in reputation as a significant cultural institution in California and the nation.
- Continue the development of Friends of the Sutro Library as a focussed support group under the auspices of the California State Library Foundation.
- Explore the possibilities of recasting the present California State Library Foundation into an in-house foundation modeled upon that currently serving the State Archives and the Los Angeles Public Library Foundation.
- Support the work of the Sesquicentennial Commission and Foundation within the CSL.
- Develop the California State Library as the prime resource for local historical societies throughout the state by assisting them in their collection development, the organization of their libraries and their publications program.
- Develop the photography collection of the California History Collection as a major resource for scholars publishing books on California.

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- On an ongoing basis the California State Library should play a support role with the Department of Education in helping to advise and support curricula in California history for K-14.

STRATEGY 5.2 MEETING THE NEEDS OF THE BLIND, VISUALLY HANDICAPPED AND THE PRINT IMPAIRED

ISSUE

The unique needs of the blind, visually handicapped and the print impaired community requires statewide leadership relating to their reading and information needs.

GOALS

- Work with the Friends of Access News to create equal access to newspapers, magazines, and other forms of periodical literature.

STRATEGY 5.3 REPRESENT THE CALIFORNIA COMMUNITY BOTH NATIONALLY AND INTERNATIONALLY

ISSUE

Because California is the most international community on the planet, we must ensure that we maintain a diversity of both national and international connections, and serve as a reflection of the cumulative culture of the state.

GOALS

- Collaborate with the great libraries of the United States and the world as a cooperative partner in programs.

Our Planning Process

WHAT IS STRATEGIC PLANNING?

Strategic planning is a dynamic management process for ensuring that the organization's mission is accomplished, and that the vision and related goals for the future are attained in the face of rapidly changing circumstances.

Strategic planning relies upon identification and tracking of emerging or existing issues and formulation of appropriate and innovative strategies for resolving those issues in order to move the organization forward.

An issue is any problem or opportunity which has a reasonable probability of occurrence that could have a significant impact on the organization's ability to achieve its vision and accomplish its mission. An appropriate strategy is one which capitalizes on existing organizational strengths, reduces or eliminates organizational weaknesses, and is consistent with organizational philosophy and vision.

Once strategies are identified, integrated tactical plans for implementing them are developed throughout the organization and resources are allocated accordingly. Plans at all levels are reviewed and revised on an ongoing basis as existing issues change or new issues emerge.

WHY DO STRATEGIC PLANNING?

Strategic planning is valuable because it:

- *Emphasizes assessment of the environment, both outside and inside the organization*
- *Supports qualitative changes in organizational direction*
- *Supports identification and management of opportunities and threats which impact mission and vision attainment*
- *Looks toward the future, but presumes that unanticipated events can and will occur*
- *Is action oriented*
- *Teaches managers to think strategically and behave proactively*
- *Assists managers in establishing organizational, program and operational priorities*
- *Supports development of team work*
- *Supports coordination, control, and decision-making across functions and levels*
- *Encourages and supports responsiveness to our customers' expectations*
- *Directs attention to the future and to the long-range impact of decisions*

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Our Planning Process

STEPS IN THE PROCESS

- ***Definition of Mission***

  The first and most critical step in the planning process is definition of the overall organizational mission. The State Library's mission statement was reviewed and revised to ensure it accurately reflects the true purpose of the agency. This task was completed by the planning group in September 1993, and revisited in January 1996 at the conclusion of its most recent planning phase.

- ***Articulation of the Organization's Vision for the Future and Operating Values***

  The organization's commonly shared beliefs and values are communicated in written statements of its vision and organizational values. The vision and value statements were developed during the fall of 1995 and received the final approval of the planning group in February 1996.

  The vision statement is an expression of what management would like to see the State Library be if all goals were fully realized. It offers yet another standard for managers to consider when formulating strategy and making daily decisions.

  The purpose of the value statements are multi-fold. They communicate to the public, managers and staff what we believe in and serve as a reminder of important social, ethical, and professional expectations and obligations.

- ***Environmental Analysis***

  In the environmental analysis step, the planning group conducted an in-depth environmental scan of both internal and external factors to identify threats, opportunities, trends, expectations and events which could impact the organization's ability to carry out its mission and achieve its vision. An initial environmental scan was conducted between September and December 1993, with a follow-up scan occurring in January 1996. Each time the following areas were analyzed: current economic, political, legal and technological environments; clients and competition;

social and cultural forces; demographic environment; organizational structure and culture; and, human, financial and physical resources.

- ***Driving Force and Customer Base Examined***

  The State Library's current and future driving forces, as well as it's customer base, were analyzed in order to concisely target future needs. This step was first completed in February 1994 and revisited in the fall of 1995.

- ***Strategic Issue Identification***

  Significant issues facing the Library were reviewed and key issue statements were developed to address the information which emerged from the environmental scans.

  Future agency directions were then determined, and strategies which address the key issues and speak to the Library's future direction were then developed by the planning group.

IMPLEMENTING THE PLAN

The Strategic Plan is implemented through a set of integrated "tactical" plans. Like the Strategic Plan, a tactical plan includes a statement of mission and goals, but in addition, it contains measurable objectives, due dates, responsible units, and of particular importance, integrates the agency's information management strategy.

Tactical planning gives mangers an opportunity to identify specific program issues and strategies and to develop action plans for implementing those strategies. Defining objectives enables management to identify any legislation, budget change proposals, or external support or approval needed to implement their strategies. Many of the objectives identified in the various tactical plans may also serve as individual managerial performance objectives.

Our Planning Process

MAINTAINING THE PLAN

Through an ongoing informal environmental scanning process, emerging issues and changes to existing issues are identified and addressed. The potential impact to the organization is assessed and plans and strategies are developed or altered accordingly. Likewise, plans are continually updated in response to evaluation of organizational performance, as well as to the changing needs and expectations of those the organization serves or with whom it interacts.

The written Strategic Plan is reviewed and revised each year to ensure that it continues to accurately reflect the direction in which the organization wishes to move. Likewise, the written tactical plans are updated at the end of each fiscal year to reflect progress made to date, evolution of existing issues, emergence of new issues, and the need for new strategies and objectives.

THE PLANNING GROUP

The State Library's core planning group was composed of:

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Staff support in facilitating the planning process was provided by Catherine Lewis, Administration.